



Electronic Research Administration  
*A program of the National Institutes of Health*



National Institutes of Health  
*Office of Extramural Research*

# Account Management System (AMS) User Guide for iEdison external

Oct 26, 2017



## CONTACT US

---

### Document Comments:

We value your feedback on this document.

**How are we doing?** The Communications & Documentation Team of the electronic Research Administration (eRA) is dedicated to serving our community and welcomes your feedback to assist us in improving our user guides. Please send comments about the user guide to this address: [eRACommunications@mail.nih.gov](mailto:eRACommunications@mail.nih.gov).

### Troubleshooting support:

Please contact the eRA Help Desk:

**Toll-free:** 1-866-504-9552

**Phone:** 301-402-7469

**TTY:** 301-451-5939

**Web:**<http://grants.nih.gov/support> (Preferred method of contact for **external** users)

**Web:**[https://inside.era.nih.gov/eRA\\_helpdesk.cfm](https://inside.era.nih.gov/eRA_helpdesk.cfm) (Preferred method of contact for **internal** users)

**Email:**[commons@od.nih.gov](mailto:commons@od.nih.gov) (for Commons Support)

**Email:**[helpdesk@od.nih.gov](mailto:helpdesk@od.nih.gov) (for IMPAC II Support)

**Hours:** Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

## DISCLAIMER STATEMENT

---

No data shown in illustrations represents any real account, project, or individual. Any resemblance to actual accounts, projects, or individuals is purely coincidental.

## TABLE OF CONTENTS

---

1.1 Latest Updates .....	5
<b>2 Overview .....</b>	<b>8</b>
2.1 iEdison external Staff .....	8
2.2 User Roles .....	8
2.2.1 iEdison External Management Staff .....	8

2.3 Account Statuses .....	8
<b>3 Accessing AMS .....</b>	<b>9</b>
3.1 External iEdison Users .....	9
3.2 Logging Out of Account Management System (AMS) .....	10
<b>4 Search Accounts .....</b>	<b>11</b>
4.1 User Accounts .....	11
4.2 System Accounts .....	11
4.2.1 Certificates .....	11
4.3 Search for iEdison User Accounts .....	11
4.3.1 External iEdison User Account Search Results .....	12
4.4 Search for System Accounts .....	14
4.4.1 System Account Search Results .....	15
<b>5 Create Accounts .....</b>	<b>18</b>
5.1 Create User Accounts .....	18
5.2 Create System Accounts .....	18
5.3 Create an iEdison external user account .....	18
5.3.1 Account Invitations from eRA Systems .....	20
5.3.1.1 Examples of system-generated account invitations: .....	21
5.3.1.2 Workflow .....	21
5.3.2 Add/Delete User Roles .....	22
5.3.3 Set Primary Organization .....	23
5.4 Create System Accounts .....	25
5.4.1 Add System Roles .....	28
5.4.2 Validate Certificate .....	30
<b>6 Manage Accounts .....</b>	<b>34</b>
6.1 User Accounts .....	34

6.2	System Accounts .....	34
6.3	Managing External User Accounts .....	34
6.3.1	Account Statuses .....	37
6.3.2	Add/Delete User Roles .....	38
6.3.3	Affiliate Account .....	39
6.3.4	Unaffiliate Account .....	41
6.4	Manage System Accounts .....	42
6.4.1	Add System Roles .....	44
6.5	Reactivate Account .....	46
6.6	Change Password .....	47
6.7	Reset Password .....	49
<b>7</b>	<b>User Reports .....</b>	<b>50</b>
7.1	All Users Report Screen for External Users .....	50
7.2	Role Description Report .....	52
<b>7</b>	<b>Report Output .....</b>	<b>53</b>
7.3	All Users Report output .....	53
7.4	Role Description Report output .....	53
7.5	Navigating the report output .....	53

## **1.1 Latest Updates**

Updates and new features in AMS:

### **Oct 26, 2017**

- The account unlock operation now requires the user to login that day: When an administrator unlocks an account that's been locked due to inactivity, an email notification is sent that asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

### **May 18, 2017**

- The temporary passwords used in system-generated iEdison external account invitations and password reset emails are only valid for 24 hours: Users must log in the same day they receive the notification email, and those who attempt to login with an expired password will be redirected to the password reset/lost password workflow. For more information see [Account Invitations from eRA Systems](#), [Initial Login to eRA Account](#), and [Reset Password](#).

### **Feb 16, 2017**

- The AMS User Guide has been split into separate documents for each user domain ( Agency, Commons, iEdison, State Dept). When you login to AMS, the system recognizes your domain and uses it to select the correct online help package.
- It's now possible to search for system accounts by IMPACII user ID.
- Added a more prominent link to the Person Administration module in the Manage Account and Create Account confirmation screens. Click to manage user names and other personal information.

### **Dec 22, 2016**

- When you unlock an account, the user receives a notification saying that he or she has to login to the account on that same day or the account will be relocked. See [Reactivate Account](#)
- eRA Service Desk agents can click the **Add Roles to Other org** button to give a system account roles in another organization. See [Add/Delete System Roles](#)

- Added instructions for verifying a new Commons account when you receive a *Notification of New Account* from eRA. See [Notification of New Account](#)

## **Nov 17, 2016**

- Removes all roles associated with an account when Account Coordinators or Service Desk Agents deactivate the account.
- Allows Account Coordinators to re-certify active accounts to prevent the account holder from getting locked out. Note it will be a requirement for Account Coordinators to input a comment and upload an account request form to clarify the re-certification.
- Allows eRA Service Desk Agents to reactivate users and add mapping if no mapping exists.
- Enhances Deactivated Users Report to display correct information, including Deactivated By and Account Deactivation Date.
- Updates the email notifications sent prior to account deactivation to indicate that users should contact their Account Coordinator instead of the eRA Service Desk to request account re-activation.

## **Sept 15 2016:**

- The Create Account screen now lets NIH/Agency administrators search the NED system to find user profiles in their organizations. See [Create Agency Accounts](#) for more information.
- Create-Account requests for untrusted Commons accounts can now be approved or rejected automatically. See [Create Commons or external iEdison User Accounts](#) for more information.

## **Aug 18 2016:**

- Enhancements to the reporting functionality, including a new internal report on deactivated user accounts. See [User Reports](#).
- Account Coordinators can now upload new or revised account request forms from the Manage Account screen. See [Manage Account Request Forms](#) for instructions.
- Account Coordinators and Service Desk agents can now search for accounts that have been locked due to inactivity and reactivate them. See [Search by Status](#) for instructions.

- New requirements for accounts with administrative roles: Once a user has held an administrative role (SO/AO, AA, BO, or TTO Admin/User) at one institution, that account cannot be changed to a strictly scientific role, and cannot be affiliated to a different institution in any administrative **or** scientific role: In these cases, the former administrative user must create a new account to use in his or her new role. See [Affiliate Account](#) for more information.

### **July 22 2016:**

- Service Desk Agents can now update User IDs on their accounts.
- In the Search Results screen, the label of the Filter box has been changed to Filter Results.
- Search-by-country functionality is now available for state accounts.

### **June 23 2016:**

- AMS validates users' affiliations for administrative roles (SO/AO, AA or BO user roles) to make sure users have administrative roles at only one institution.
- The Account Coordinator (or the Service Desk) can now view and if necessary replace an account's Account Request Form (ARF).

## 2 Overview

---

The Account Management System (AMS) facilitates user and system account administration based on assigned user roles. The system provides the ability to search existing accounts. When a search is performed, all records that meet the search criteria are returned on the *Search Accounts* screen.

### 2.1 iEdison external Staff

External iEdison management staff have the ability to search, create, maintain, and view user and system accounts for their organization. The iEdison Agency and ERL staff have the ability to search, create, maintain, and view user accounts only for their organization. The external iEdison management staff have the ability to search, create, maintain, and view **user** and **system** accounts for their organization. The iEdison Agency and ERL staff have the ability to search, create, maintain, and view user accounts only for their organization.

### 2.2 User Roles

The following users have the ability to search for, manage and create accounts, and to add or remove roles for user and system accounts:

#### 2.2.1 iEdison External Management Staff

- Extramural Technology Transfer Office Administrator (Extramural TTO Admin)

### 2.3 Account Statuses

AMS user accounts can have the following statuses:

- *Active* — A valid account in good standing.
- *Deactivated* — Account has been disabled by an administrator
- *Locked due to inactivity* — Locked by the system due to inactivity (no user activity for 120 days).
- *Pending Affiliation* — Account has not yet been associated to an organization
- *Profile Only* — A profile that is not associated to a user account.

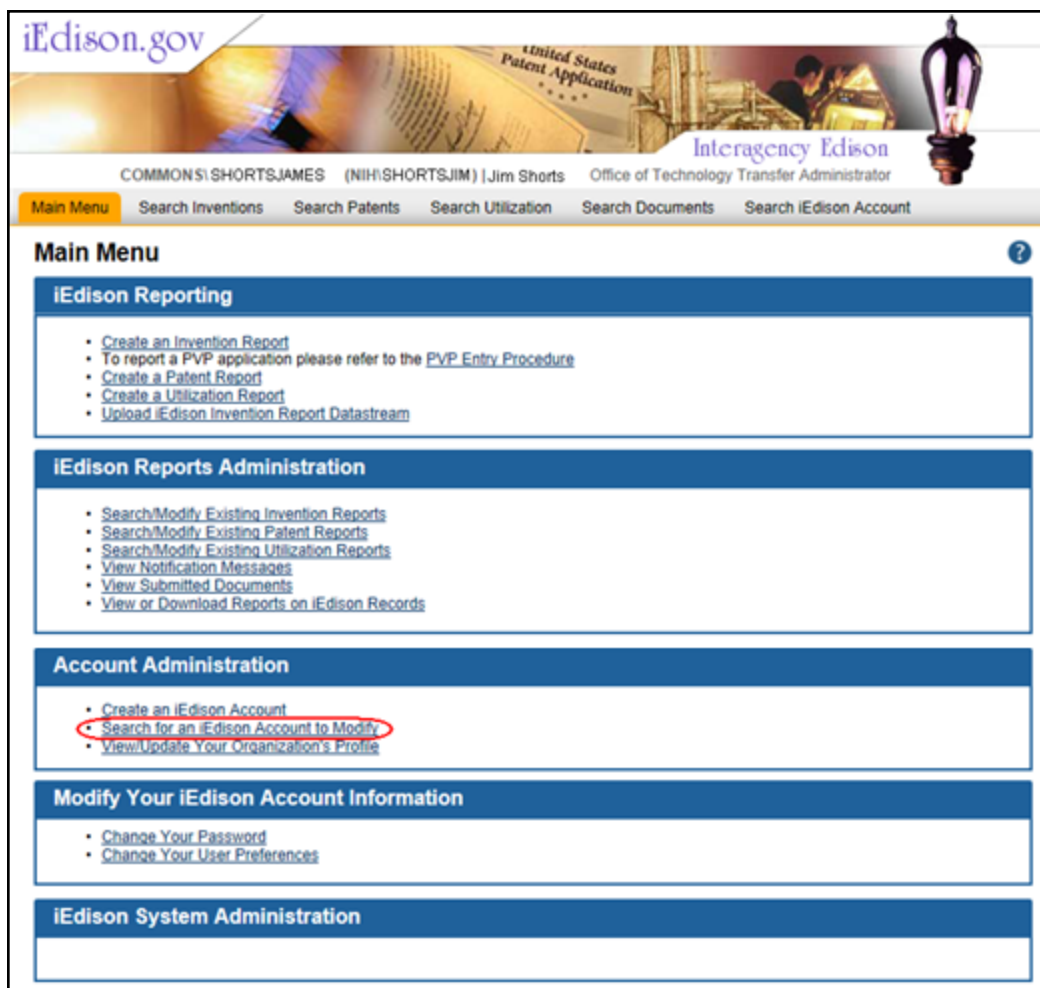


## 3 Accessing AMS

---

### 3.1 External iEdison Users

To access AMS, go to the iEdison *Main Menu* and click **Search for an iEdison Account to Modify**, as shown here.



---

**NOTE:** Before you attempt to create a new account, it is best to perform a search to make sure the user doesn't already have an account. But you can also launch AMS by clicking the **Create an iEdison Account** hyperlink.

---

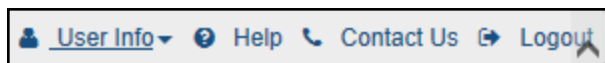
When you click **Search for an iEdison Account to Modify**, the AMS *Search Accounts* screen opens, as shown here.

The screenshot shows the 'Search Accounts' page in the AMS. At the top, there is a navigation bar with links to 'U.S. Department of Health & Human Services', 'National Institutes of Health', and 'Office'. Below this is the 'eRA Electronic Research Administration' header. The main content area has tabs for 'Manage Accounts' and 'Change Password'. The 'Search Accounts' section includes a 'Search Criteria' dropdown, a checkbox for 'Search within my organization' (highlighted with a red circle), and a note: 'NOTE! You must enter at least one search field, besides User Type and Account Status.' Below the note are several search fields: 'User Type' (set to 'Commons'), 'Account Status' (set to 'All'), 'User ID', 'Last Name', 'First Name', 'Middle Name', 'Email', and 'Roles'. At the bottom of the search criteria section, there are 'Search' and 'Clear' buttons (both highlighted with red circles). A 'Back to top' link is visible in the bottom right corner.

For instructions on performing a search, see [Search Account](#).

### 3.2 Logging Out of Account Management System (AMS)

To log out of AMS, click the **Logout** button at the top right corner of the any screen.



## 4 Search Accounts

### 4.1 User Accounts

Use the *Search Accounts* screen to search for existing user and system account(s) within or outside of your organization or institution.

See [Search for User Accounts](#)

### 4.2 System Accounts

Agency, Commons and external iEdison users can search for system accounts

See [Search for System Accounts](#)

#### 4.2.1 Certificates

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the [Web Services Certificate \(S2S\) Guide](#):Section 2.4.2 for iEdison users

### 4.3 Search for iEdison User Accounts

The *Search Accounts* screen for iEdison users (external, Agency, and iEdison Report Lite (ERL) provides the ability to search for existing user and system account(s).

**NOTE:** For all iEdison users the **Search within my organization** check box is automatically checked.

Manage Accounts | AMS User Reports

### Search Accounts ?

Search Criteria

☐ Search only within my organization ?

**NOTE!** You must enter at least one search field, besides User Type and Account Status.

User Type	Account Status	User ID
Agency	All	
Last Name	First Name	Middle Name
Email	Roles ?	
Additional Information	Organization/Department	
Federal Supervisor Last Name	Federal Supervisor First Name	Federal Supervisor Middle Name

Search Clear

---

**NOTE:** For external iEdison users the **User Type** is *Commons*.

---

---

**NOTE:** For Agency/ERL users the **User Type** is *Agency*.

---

---

**NOTE:** You must enter at least one search field, besides the **User Type** and **Account Status**. The percent sign (%) can be used as a wild card character to search for a string of characters.

---

1. Enter search criteria in at least one of the other search fields.
  2. If you wish, select the appropriate Role.
    - a. To select multiple roles, hold the <Ctrl> key and highlight the appropriate roles.
- 

**NOTE:** When you search by roles, you can only search within your organization. You can select multiple roles, but the default search is for all roles appropriate to the logged in user's account role.

---

3. Perform one of the following options:
  - a. Click the **Search** button to execute the search.
    - i. Please refer to the [Search Results for iEdison User Accounts](#) topic or [Agency and iEdison Agency/ERL User Account Search Results](#)
  - b. Click the **Clear** button to clear the search criteria.

If an external iEdison user has appropriate privileges to work with system accounts and the **User Type** selected is *System* , then the **Search within my organization** check box is automatically checked. For more information, see [Search for System Accounts](#).

### 4.3.1 External iEdison User Account Search Results

When the **Search** button is clicked, the system displays appropriate user accounts in the **Search Results** located below the *Search Criteria* section on the *Search Accounts* .

## Account Management System (AMS)

AMS

Manage Accounts

Search Accounts ⓘ

Search Criteria

Search Results

Showing 1 - 10 of total 11

Filter Results:

Show 10 per page « 1 2 »

User ID	Name	Email	Account Status	Roles & Affiliations	Action
BEACHSANDY	<a href="#">Beach, Sandy</a>	eRATest@mail.nih.gov	Active	EXTRAMURAL_TTO_USER - Dan's Institution	<a href="#">Manage</a>
BEACHSUN	<a href="#">Beach, Sun</a>	eRATest@mail.nih.gov	Active	EXTRAMURAL_TTO_ADMIN - Dan's Institution	<a href="#">Manage</a>
BROWNMICK	<a href="#">Brown, Mickey</a>	eRATest@mail.nih.gov	Active	EXTRAMURAL_TTO_ADMIN - Dan's Institution	<a href="#">Manage</a>
JACKNIMBLE	<a href="#">Jack, Nimble</a>	eRATest@mail.nih.gov	Active	EXTRAMURAL_TTO_ADMIN - Dan's Institution	<a href="#">Manage</a>
HOPEBOB	<a href="#">Hope, Bob</a>	eRATest@mail.nih.gov	Active	EXTRAMURAL_TTO_ADMIN - Dan's Institution	<a href="#">Manage</a>
JACKNIMBLE	<a href="#">Jack, Nimble</a>	eRATest@mail.nih.gov	Active	EXTRAMURAL_TTO_ADMIN - Dan's Institution	<a href="#">Manage</a>
LAUDER_ESTEY	<a href="#">Lauder, E.</a>	eRATest@mail.nih.gov	Active	EXTRAMURAL_TTO_ADMIN - Dan's Institution	<a href="#">Manage</a>
LIGHTBUD	<a href="#">Light, Bud</a>	eRATest@mail.nih.gov	Active	EXTRAMURAL_TTO_USER - Dan's Institution	<a href="#">Manage</a>
WHIPLASHNIDELY	<a href="#">Whiplash, S</a>	eRATest@mail.nih.gov	Active	EXTRAMURAL_TTO_USER - Dan's Institution	<a href="#">Manage</a>
WHALEJONA	<a href="#">Whale, Jona</a>	eRATest@mail.nih.gov	Active	EXTRAMURAL_TTO_USER - Dan's Institution	<a href="#">Manage</a>

Create New Account

Back to top

**NOTE:** The **Create New Account** button does not display until a search is performed.

The following columns appear in the search results:

- **User ID**
- **Name** - last name, first name
- **Email**
- **Account Status** -
  - *Active* - The **Manage** button displays in the **Action** column.
  - *Pending* - The **Resend Email** button displays in the **Action** column.

- *Pending Affiliation* - The **Manage** button displays in the **Action** column.
- *Profile Only* - The **Create** button displays in the **Action** column.
- **Roles & Affiliations**
- **Action** - The **Action** button is **Manage**.

You can take these actions to view and navigate the search results:

1. To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.
2. To filter the search results, enter the appropriate value in the **Filter:** text box and hit the **<Enter>** key.
  - a. For example, to view all users with the Extramural TTO User role, type *TTO user* in the **Filter:** text box.
3. To change the number of records per page, select a number in the **Show per page** column.
4. To navigate between pages, perform one of the following options:
  - a. Click the appropriate **Page Number** button.
  - b. Click the **right double arrows** button to go to the end of the list.
  - c. Click the **left double arrows** button to go to the beginning of the list.
5. To sort the search results, click the appropriate column heading name's **down arrow** (ascending sort) or the **up arrow** (descending sort). The default sort is by **Name** (Last Name, First Name).
6. To view the *NIH Support View* screen, select the appropriate name hyperlink in the **Name** column.
  - a. For more information, please see the [NIH Support View](#) topic.
7. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a users' multiple affiliations.
8. To perform one of the options in the **Action** column, See [Actions Options](#).
9. To create a new account and profile click the **Create New Account** button at the bottom of the screen. See [Create external User Accounts](#).
10. To return to the top of the screen, click the **Back to top** hyperlink.

## 4.4 Search for System Accounts

Use the , to search for existing user and system account(s).

---

**NOTE:** Agency, Commons, and external iEdison users can search for and create system accounts.

---

The screenshot shows the 'AMS User Reports' page. At the top is a navigation bar with links: Agreement, Pay Plan, FOA, IMS, Terms Management, eRA Search, ARA, ACR, PMM, Checklist Management, CM/TMGMT, REV, PGM, FCOI, and Grants Closeout. Below the navigation bar is the title 'AMS User Reports'. A light blue horizontal bar separates the title from the search section. The search section has a pink header with the text 'one search field, besides User Type and Account Status.' Below this header are several search fields: a dropdown menu for 'User Type', a text field for 'Certificate Owner', a text field for 'Certificate Serial Number', a text field for 'First Name', a text field for 'Middle Name', and a text field for 'Roles' with a blue help icon. There are also empty text fields for additional search criteria.

---

**NOTE:** You must enter at least one search field, besides the **User Type** and **Account Status**. Wild card characters such as the percent sign (%) can be used to search for a string of characters.

---

Perform the following steps:

1. To search for a system account, select *System* from the **User Type** field's drop-down menu.
2. Enter the appropriate search criteria in at least one of the other search fields besides **User Type**.
3. Use the **User ID** field to search by IMPACII user ID
4. If you wish, select a **Role** from the drop-down menu. (To select multiple roles, hold the <Ctrl> key and highlight the desired roles.)

---

**NOTE:** When you search by system roles, you can only search within your organization. You can select multiple roles, but the default search is for all roles appropriate to the logged in user's account role.

---

5. Click **Search** to execute the search or click **Clear** to clear the fields and start over.

### 4.4.1 System Account Search Results

When the **Search** button is clicked, the system displays appropriate system accounts in the **Search Results** located below the *Search Criteria* section on the *Search Accounts* screen. The search results are sorted alphabetically first by last name, first name in the **Name** field and then by **Account Status**.

---

**NOTE:** The **Create New Account** button does not display until a search is performed.

---

The following columns appear in the search results:

- **User ID**
- **Name** - last name, first name
- **Organization**
- **Roles & Affiliations**
- **Certification Owner** - The **Certificate Owner** is the organization who acquired the certificate.
- **Action** - Option button is **Manage**.

AMS | FCOI

Manage Accounts

Search Accounts

Search Criteria

Search Results

Showing 1 - 10 of total 1

Filter Results:

Show 10 per page < 1 2 >

User ID	Name	Organization	Roles & Affiliations	Certificate Owner	Action
SYS_SHORTYT_460	Shorty, Tall	Hobart and William Smith Colleges	APPLICANT_RETRIEVAL_DATA_SERV - Hobart and William Smith ... Read More	HOBART	Manage
SYS_SMITHB_199	Smith, Black	National Cancer Foundation	APPLICANT_RETRIEVAL_DATA_SERV - National Cancer ... Read More	NATIONAL CANCER FOUNDATION	Manage
SYS_SHORTSJ_902	Shorts, Jim	National Institute of Health	APPLICANT_RETRIEVAL_DATA_SERV - National Institute of ... Read More	NIH	Manage
SYS_SMARTG_439	Smart, Get	University of California Los Angeles	APPLICANT_RETRIEVAL_DATA_SERV - University of California ... Read More	NCI	Manage
SYS_SMOEJ_81	Smoe, Joe	University of California Los Angeles	APPLICANT_RETRIEVAL_DATA_SERV - University of California ... Read More	UNIVERSITY OF CALIFORNIA	Manage
SYS_SALEMP_748	Salem, Mass	University of Michigan	APPLICANT_RETRIEVAL_DATA_SERV - University of Michigan ... Read More	UNIVERSITY OF MICHIGAN	Manage
SYS_SALEMP_974	Salem, Mass	University of Michigan	APPLICANT_RETRIEVAL_DATA_SERV - University of Michigan ... Read More	UNIVERSITY OF MICHIGAN	Manage
SYS_SAA_341	Sack, Sad	TS - Agency for Toxic Substances and Disease Registry	IC_ACCESS_GF_METADATA_SERV	ASD	Manage
SYS_SDS_529	Sack, Sad	TS - Agency for Toxic Substances and Disease Registry	ITP_SRV_COUNCIL_UPDATE_ROLE - Agency for Toxic ... Read More	ASDASD	Manage
SYS_SALEMP_463	Salem, Mass	University of Michigan	SERVICE_PROVIDER_ROLE	UNIVERSITY OF MICHIGAN	Manage

Create New Account

Back to top

Perform one or more of the following steps :

1. To view the **Search Criteria**, click anywhere in the **Search Criteria** bar.
2. To filter the search results, enter the appropriate value in the **Filter:** text box and hit the **<Enter>** key.
  - a. For example, to view all users with the last name of Salem, type *Salem* in the **Filter:** text box.

---

**NOTE:** The default number of records per page is 10.

---



5. To change the number of records per page, select the appropriate number in the **Show per page** column.
6. To navigate between pages, perform one of the following options:
  - a. Click the appropriate **Page Number** button.
  - b. Click the **right double arrows** button to go to the end of the list.
  - c. Click the **left double arrows** button to go to the beginning of the list.
7. If displayed, click the **Read More** hyperlink in the **Roles and Affiliations** column to view a system user's multiple affiliations.
8. To manage a system account, click the **Manage** button in the **Action** column.
  - a. Please refer to the [Manage System Accounts](#) topic for more information.
9. To create a new account and profile click the **Create New Account** button at the bottom of the screen.
  - a. Please refer to the [Create System Account](#) topic for more information.
10. To return to the top of the screen, click the **Back to top** hyperlink.

## 5 Create Accounts

---

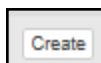
You can create the following types of accounts:

### 5.1 [Create User Accounts](#)

### 5.2 [Create System Accounts](#)

### 5.3 **Create an iEdison external user account**

1. To create a new user account, first search AMS to make sure the user doesn't already have an account. For instructions, see [Search for iEdison User Accounts](#).
2. You launch the create-account process from the [Search Results](#) screen [Search Results](#) screen.
  - In the search results, profiles that are not already associated to a user account display a **Create** button in the Action column:



Click the **Create** button to create a user account for that profile.

- Or click the **Create New Account** button located below the search results:



---

**NOTE:** For external iEdison users, click the **Create an iEdison Account** hyperlink on the iEdison *Main Menu* screen to create an account.

---

3. When you click one of the **Create** buttons, the *Create Account* screen opens, as shown below.

AMS

Manage Accounts | Change Password

Create Account ⓘ

All fields are required unless they're marked (Optional)

[Go Back](#)

**User Information**

User Type  
Commons ▼

User ID ⓘ

Primary Organization  
University of California Los Angeles

**Contact Information**

Last Name

First Name

Middle Name (Optional)

Email

Confirm Email

**Roles**

+ Add Roles

Create Clear

Perform the following steps to create an account:

4. Set **User Type** to Commons.
5. Enter the **User ID** or let the system generate one.
  - a. The **User ID** length should be between 6 and 30 characters and should **NOT** contain special characters except the @ sign, the hyphen, the period, and the underscore.
  - b. The system can display the following messages: *This User ID is available* OR *This User ID is already taken, please use another one.*
6. Usually the **Primary Organization** defaults to the logged in user's organization.
  - a. If there is no user organization name selected, click the magnifying glass icon to assign a **Primary Organization**. (See [Set Primary Organization](#) for more information.)
7. Perform one of the following options:
  - a. When the account information is complete, click **Create** to create the account or click **Clear** to clear all information from the form.

When you click **Create**, the system displays the *Account Details* screen with a success message, as shown here.

AMS

Manage Accounts Change Password

Account Details ⓘ

✓ **SUCCESS** X  
Account created successfully!

User Information

User Type Commons

User ID BEACHSANDY

Primary Organization University of California Los Angeles

Contact Information

Name Beach, Sandy

Email eraDEV@mail.nih.gov

Roles

Showing 1 - 1 of total 1

Role(s) ▲	Organization(s) ▼
AA	University of California Los Angeles

Manage Back to Search

6. Perform one of the following options on the *Account Details* screen:
- To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.
  - To edit the account's information, click the **Manage** button.
    - For more information, please refer to the [Manage Account for Commons Users](#) topic.
  - To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

### 5.3.1 Account Invitations from eRA Systems

Create-Account requests for eRA accounts that are validated by invitations from eRA modules can be approved or rejected automatically:

- If the identifying information the new user submits unambiguously matches the profile created by the account requester and the profile is not already associated to another user account, the request is approved automatically.
- If the identifying information is incorrect or an account already exists for the user profile, or if a comment has been entered in the user's funding and committee service history, request is denied and the system sends notifications to the account requester and to the eRA Service Desk.

#### **5.3.1.1 Examples of system-generated account invitations:**

- **SO creates a new PI account in AMS**

The new PI receives a system-generated invitation to log in to eRA Commons and validate the account.

- **SRO enables a new reviewer in Internet Assisted Review (IAR)**

The reviewer receives a system-generated invitation to log in to eRA Commons and create an account to access IAR. See the [IAR Online Help](#) for information on enabling reviewers

- **PD/PI appoints a new trainee in xTrain**

The trainee receives a system-generated invitation to log in to eRA Commons and create an account to access xTrain. See [xTrain Online Help](#) for information on appointing trainees.

#### **5.3.1.2 Workflow**

The account invitation procedure includes these steps:

1. The account requester creates the new account.
2. The new user receives an email notification that includes the username and other details about the new account.
3. The user receives a second email that includes a temporary password for the new account and instructions for logging into the system. This email explains that that the user must login to the system that day or the account will be locked. After an account is locked, any attempt to log in will be redirected to the password reset/lost password workflow.. See [Initial Login to eRA Account](#).

4. The user logs in with the provided credentials and is immediately instructed to create a new password for the account.

---

**NOTE:** If the user enters incorrect login information too many times, the account is locked and the user must contact the eRA Service Desk to complete the login process.

---

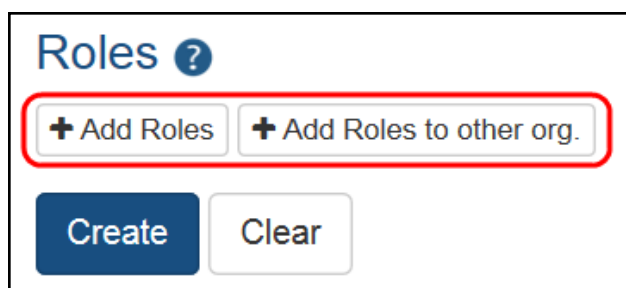
### 5.3.2 Add/Delete User Roles

---

#### NOTES:

- The list of roles displayed is dependent on the logged in user's role.
- Accounts with scientific roles should be maintained for the career of the scientist and affiliations should be added as necessary.
- Administrative roles cannot be combined with scientific roles on the same user account and accounts with administrative roles cannot be affiliated with more than one institution.

- 
1. To add user roles to an account, click on the + **Add Roles** button at the bottom of the *Create Accounts* or *Manage Accounts* screen, as shown here.



When the + **Add Roles** button is clicked on the *Create Account* or *Modify Account* screen, the pop-up *Add Roles* screen displays.

AMS | Add Roles

Organization

Dan

Role(s) (to multi-select, please use ctrl or shift keys)

EXTRAMURAL\_TTO\_ADMIN - Extramural Technology Transfer Official Administrator

EXTRAMURAL\_TTO\_USER - Extramural Technology Transfer Official User

Close Add Role(s)

1. Select the appropriate role.
2. Click the **Add Roles(s)** button.

When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).

Roles ?

+ Add Roles x Remove All

Showing 1 - 1 of total 1


Role(s)	Organization(s)	Action
EXTRAMURAL_TTO_USER	Dan's Institution	x Remove

3. To add additional roles, click the + **Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

### 5.3.3 Set Primary Organization

**NOTE:** The **magnifying glass** for the **Primary Organization** field on the *Create Account* screen appears if the logged in user is not affiliated with an Organization, IC, or Agency. Usually the **Primary Organization** defaults to the logged in user's Organization.

**Primary Organization**



1. To add a primary organization click the **magnifying glass** icon on the *Create Account* screen.

When the **magnifying glass** icon is clicked, the *Search Organization and Add Roles* screen opens.

AMS | Search Organization and Add Roles

Use % for non-exact matches!

Org ID

Organization Name

Search

Showing 1 - 10 of total 25

Filter:

Show

10

per page

«

1

2

3

»

Select	Org. ID	Org. Name
<input type="radio"/>	10002757	Touro University of California
<input checked="" type="radio"/>	577503	University of California at Davis
<input type="radio"/>	1092530	University

Close

Select

2. Enter an **Org ID** or an **Organization Name**.

**NOTE:** Wild card characters such as the percent sign (%) can be used to search for a string of characters.

3. Click the first **Search** button.

When the first **Search** button is clicked, the organization is displayed, if present.



4. To filter the search results, enter the appropriate value in the **Filter:** text box and hit the **<Enter>** key. For example, enter *San Diego* to view only those universities in California.
5. To change the number of records per page, select the appropriate number in the **Show per page** column.
6. To navigate between pages, perform one of the following options:
  - a. Click the appropriate **Page Number** button.
  - b. Click the **right double arrows** button to go to the end of the list.
  - c. Click the **left double arrows** button to go to the beginning of the list.
7. Select the appropriate organization's radio button.
8. Click the second **Select** button or click the **Close** button to close the screen.

When the second **Select** button is clicked, the *Create Account* screen displays the selected primary organization. For more information see [Create External User Accounts](#).

### 5.4 Create System Accounts

System accounts are used to access eRA [Web Services](#).

Agency, Commons, and external iEdison users can create system accounts.

1. To create a system account, first perform a search to make sure the account you want to create does not already exist.
  - a. For instructions see [Search System Accounts](#).

---

**NOTE:** The **Create New Account** button described below is not available until a search is performed.

---

2. Review the search results to see if the account you want already exists, and if not, click the **Create New Account** button that appears below the search results, shown here:

User ID	Name	Organization
SYS_SHORTYT_460	Shorty, Tall	Hobart and William Smith Colleges
SYS_SAA_341	Sack, Sad	TS - Agency for Toxic Substances and Disease Registry
<b>Create New Account</b>		

When you click **Create New Account**, the .

3. Select *System* in the **User Type** drop-down menu.

When you select user type *System*, the screen displays the fields you need to complete for a system account.

The screenshot shows the 'Create Account' form in the AMS system. The 'User Type' is set to 'System'. The 'Primary Organization' is 'University of California Los Angeles'. The 'Certificate Owner' is 'Univ of CA - Los Angeles'. The 'Certificate Provider/Authority' is 'Go Daddy Certificate Authority'. The 'Certificate Serial Number' is 'SB-12:34:56:78:90'. The 'Contact Information' section includes 'Last Name' (Whiplash), 'First Name' (Snidely), 'Middle Name' (Optional), 'Email' (Whiplash@ucla.edu), and 'Confirm Email' (Whiplash@ucla.edu). The 'Roles' section shows a table with one role: 'APPLICANT\_RETRIEVAL\_DATA\_SERV' for the 'University of California Los Angeles'. At the bottom, there is a checkbox for 'I am aware of and understand my responsibilities in providing the information pertaining to this system account.' and 'Create' and 'Clear' buttons.

AMS  
Manage Accounts Change Password

Create Account ⓘ  
All fields are required unless they're marked (Optional) Go Back

User Information  
User Type  
System

Primary Organization  
University of California Los Angeles

Certificate Information  
Certificate Owner ⓘ  
Univ of CA - Los Angeles  
Certificate Provider/Authority  
Go Daddy Certificate Authority  
Certificate Serial Number  
SB-12:34:56:78:90

Contact Information  
Last Name First Name Middle Name (Optional)  
Whiplash Snidely  
Email Confirm Email  
Whiplash@ucla.edu Whiplash@ucla.edu

Roles  
Add Roles Remove All

Showing 1 - 1 of total 1

Role(s)	Organization(s)	Action
APPLICANT_RETRIEVAL_DATA_SERV	University of California Los Angeles	Remove

☒ I am aware of and understand my responsibilities in providing the information pertaining to this system account.

Create Clear

4. Type in the owner in the **Certificate Owner** field. The **Certificate Owner** is the organization who acquired the certificate.
5. Select the appropriate **Certificate Provider/Authority** from the drop-down menu.

---

**NOTE:** Examples of the values that are available for the Certificate Provider/Authority include: Comodo, Digicert, Entrust, Geo Trust, Go Daddy, InCommon, and Thawte.

---

6. Enter the **Certificate Serial Number** in the format XX:XX:XX:XX:XX:XX:XX:XX.

For information on obtaining and registering a certificate from a Certificate Provider or Authority, refer to one of the [Web Services Certificate \(S2S\) Guide](#):

- Section 2.4.2 for iEdison users - only users with the TTO Admin user role have the privileges necessary to register the certificate in AMS; iEdison users must work with their TTO Admin user to register their certificate
2. Complete the **Contact Information**.
  3. Click the **Add Roles** button to add the roles to the account.
    - a. Note the role description on the screen when adding a role.
    - b. See [Add System Roles](#) for more information.
  4. Select the **Agreement** check box below the *Roles* section.

The **Agreement** check box is mandatory for the user to acknowledge information provided for the system account. If the **Agreement** check box is not checked and the **Save** button is clicked, the system displays the following error message: *User must accept the agreement by checking the field.*

5. Click the **Create** button to create the account or click **Clear** to clear all fields.

When you click **Create**, the system validates the account information. If there are no errors, then the *Account Details* screen opens, displaying a success message, .

AMS  
Manage Accounts Change Password

Account Details [Go Back](#)

**SUCCESS**  
Account created successfully!

**Note:** Validate Certificate button will validate  
1. If certificate authority is supported by NIH.  
2. If the uploaded certificate details match the certificate details entered.

**User Information**

User Type System  
User ID SYS\_WHIPPLASHS\_374  
Primary Organization University of California Los Angeles

**Certificate Information**

Certificate Owner Univ of CA - Los Angeles  
Certificate Provider/Authority Go Daddy Certificate Authority  
Certificate Serial Number SB:12:34:56:78:90

**Contact Information**

Name Whiplash, Snidely  
Email Whiplash@ucia.edu

**Roles**

Showing 1 - 1 of total 1

Role(s)	Organization(s)
APPLICANT_RETRIEVAL_DATA_SERV	University of California Los Angeles

[Manage](#) [Back to Search](#) [Validate Certificate](#)

### Other Actions:

- Click the **Validate Certificate** button to validate the certificate. See [Validate Certificate](#) for more information.
- Click the **Manage** button if you want to make additional changes. See [Manage System Accounts](#) for more information.
- Click the **Back to Search** button to return to the *Search Account* screen.

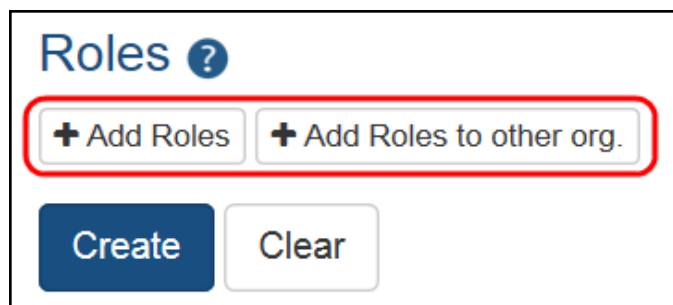
### 5.4.1 Add System Roles

---

**NOTE:** The list of roles is dependent on the logged-in user's role.

---

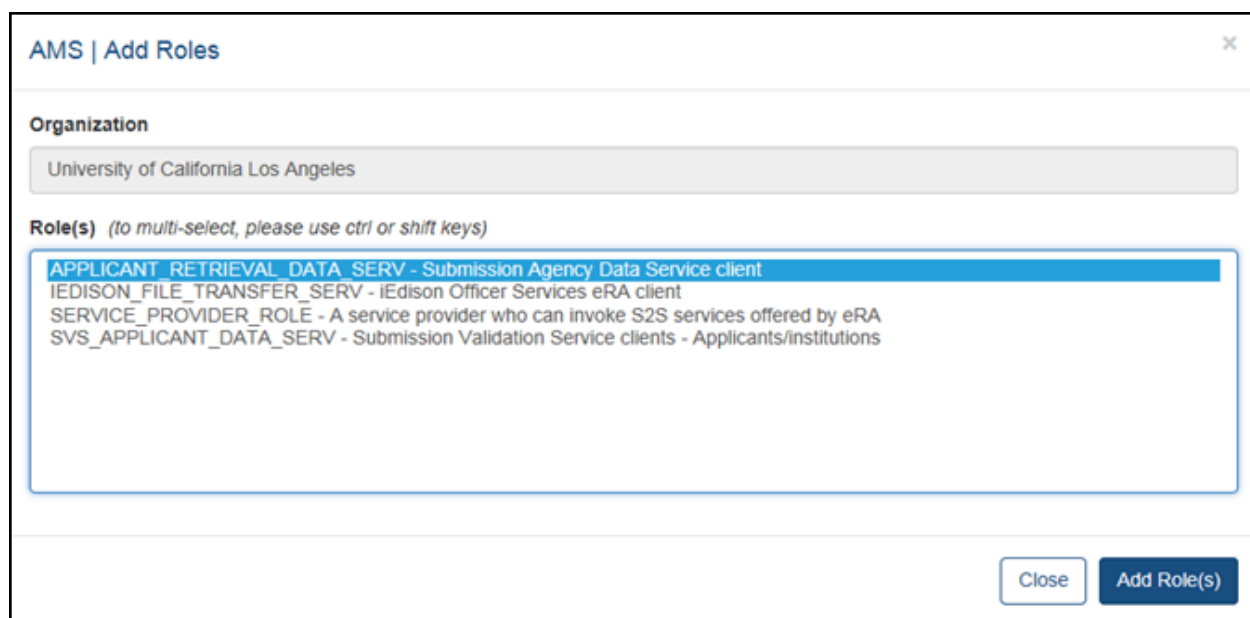
1. To add system roles to the account, click on the + **Add Roles** button on the *Create Accounts* screen.



The screenshot shows a section titled "Roles" with a help icon. Below the title are two buttons: "+ Add Roles" and "+ Add Roles to other org.", both of which are highlighted with a red rectangular border. Below these buttons are two more buttons: "Create" (in a dark blue box) and "Clear" (in a light gray box).

When the + **Add Roles** button is clicked, the pop-up *Add Roles* screen displays.

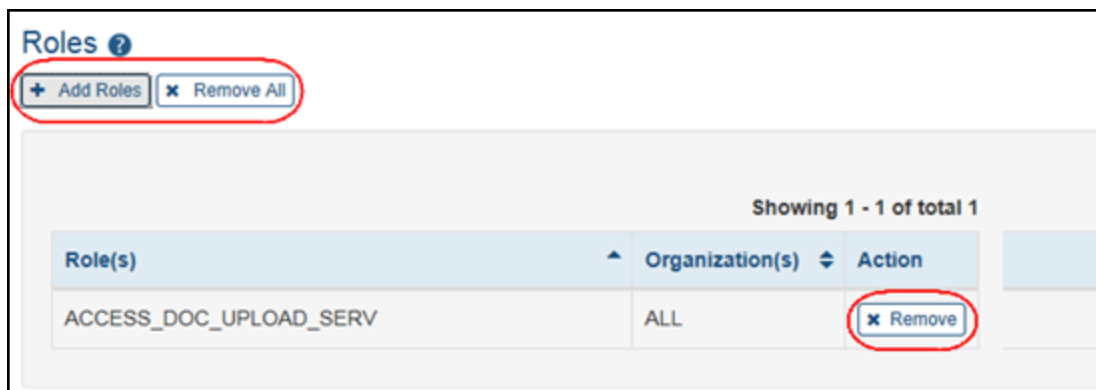
### External System Roles



The screenshot shows a pop-up window titled "AMS | Add Roles" with a close button (X) in the top right corner. The window contains a section labeled "Organization" with a text field displaying "University of California Los Angeles". Below this is a section labeled "Role(s)" with a note "(to multi-select, please use ctrl or shift keys)". A list of roles is displayed in a scrollable area, with the first role, "APPLICANT\_RETRIEVAL\_DATA\_SERV - Submission Agency Data Service client", highlighted in blue. The other roles are: "IEDISON\_FILE\_TRANSFER\_SERV - IEdison Officer Services eRA client", "SERVICE\_PROVIDER\_ROLE - A service provider who can invoke S2S services offered by eRA", and "SVS\_APPLICANT\_DATA\_SERV - Submission Validation Service clients - Applicants/institutions". At the bottom right of the pop-up are two buttons: "Close" and "Add Role(s)".

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).



3. To add additional roles, click the + **Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

#### 5.4.2 Validate Certificate

When the **Validate Certificate** button is clicked on either the *Manage Account* or *Account Details* confirmation screen, the system displays the *AMS | Validate Certificate* screen with hyperlinks to instructions for the different browsers (i.e. Internet Explorer, Firefox, and Safari, etc.) for uploading a certificate file.

1. Perform one of the following options:
  - a. To validate the certificate, click the **Validate** button on the *Validate Certificate* screen.
  - b. Click the **Cancel** button to cancel the certificate validation.

AMS | Validate Certificate

Certificate Number: LT:12:34:56:78:90


Certificate Provider: Go Daddy Certificate Authority

**NOTE!** If your certificate was not previously uploaded, please follow instructions below to upload certificate key file to browser.


- Do not close browser window until all instructions are complete.
- If instructions for a specific browser require a browser restart, please do so.

### To Import a Certificate to Browsers


Please follow instructions below to upload certificate file to browser.

**For Windows IE:**

1. Open Tools
2. Open Internet options
3. Open Content tab
4. Click Certificate button and open Certificates window
5. Click Import to start the Certificate Import Wizard
6. Type the file name containing the certificate to be imported or browse and navigate to the file
7. For more details go to "Learn more about certificates" link on the Certificates window

**For Firefox:**

Please click [here](#) for detailed instructions.

**For MAC Safari:**

Please click [here](#) for detailed instructions.

If your certificate was previously uploaded, please press Validate button

Cancel

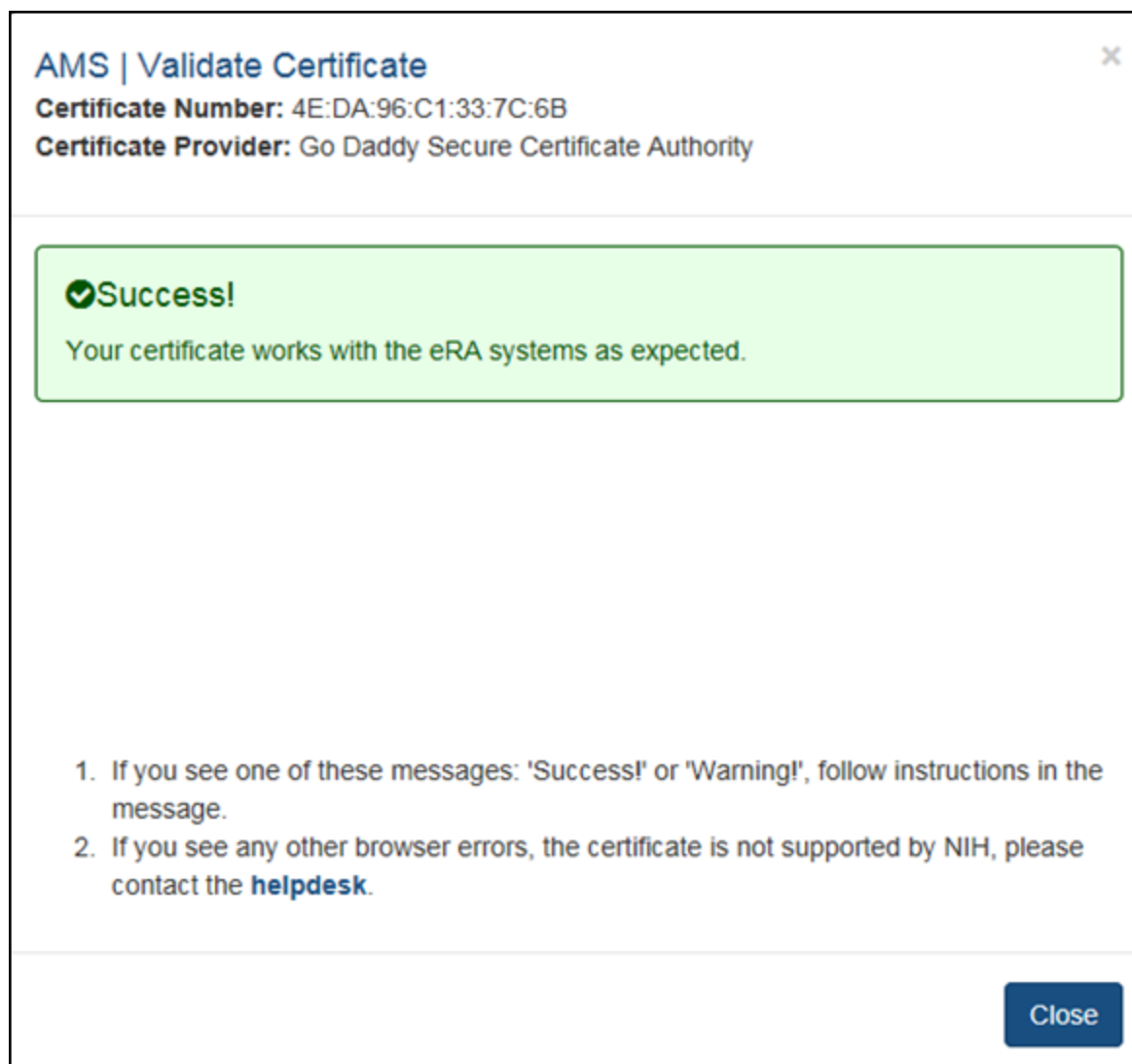
Validate

When the **Validate** button is clicked, the system performs the certificate validation.

If the browser call does go through to the certificate provider, but the details of the uploaded certificate do not match the details entered in AMS, then the following warning message opens:

*Warning! - This certificate works with eRA systems correctly, but the certificate details you entered in the account do not match information in the certificate you are trying to validate. Certificate information in the account must match certificate you are trying to validate.*

If there are no validation errors, a second *Validate Certificate* screen displays the following success message: *Success! Your certification works with the eRA systems as expected.*



2. Click the **Close** button to close the screen.

The following audit information is audited and stored in the database:

- Certificate Number – Certificate Number of the uploaded certificate during validation
- Certificate Provider – Common Name of the uploaded certificate during validation
- Certificate Owner – The Certificate Owner that was entered during validation. The Certificate Owner is the organization who acquired the certificate.
- Time of Validation – Format: DD/MM/YYYY HH:MM:SS



- Result of Validation Attempt
  - Success
  - Validation is successful but the certificate details does not match the user entered details

## 6 Manage Accounts

---

### 6.1 User Accounts

Once an account is created it can be maintained via the *Manage Accounts* screen.

- [Manage User Accounts](#)

### 6.2 System Accounts

Agency, Commons, and iEdison external users can modify system accounts.

- [Manage System Accounts](#)

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the [Web Services Certificate \(S2S\) Guide](#):

- Section 2.4.2 for iEdison users

### 6.3 Managing External User Accounts

1. Perform one of the following steps to manage a user account:
  - a. Click the appropriate **Manage** button in the **Action** column on the *Search Accounts* screen.
  - b. Click the **Manage** button on the *Account Details* screen after an account have been created or saved (edited).

When the **Manage** button is clicked via either option, the *Manage Accounts* screen opens.

Here is the Manage Account screen with an account not affiliated with an Organization or Institution.

AMS  
Manage Accounts

Manage Account [Go Back](#)

**Note:** Any changes to the account are **not saved** until you hit the save button.  
- For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

**User Information**

**User Type**  
Commons

**User ID**  
DoRightDudley

**Primary Organization**  
San Diego State University

**Contact Information**

**Last Name**  
DoRight

**First Name**  
Dudley

**Middle Name**

**Email**  
eRATest@mail.nih.gov

**Confirm Email**  
eRATest@mail.nih.gov

**Roles** [Add Role](#)

[Save](#) [Cancel](#) [Reset Password](#)

Here is the Manage Account screen with a user account affiliated with an Organization or Institute.

AMS  
Manage Accounts Change Password

Manage Account [Go Back](#)

**Note:** Any changes to the account are **not saved** until you hit the save button.  
- For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

**User Information**

**User Type**  
Commons

**User ID**  
BONDJ007

**Primary Organization**  
University of California Los Angeles

**Contact Information**

**Last Name**  
Bond

**First Name**  
James

**Middle Name**

**Email**  
eraTest@mail.nih.gov

**Confirm Email**  
eraTest@mail.nih.gov

**Roles** [Add Roles](#) [Unaffiliate](#)

Showing 1 - 1 of total 1

Role(s)	Organization(s)	Action
AA	University of California Los Angeles	<a href="#">Remove</a>

[Save](#) [Cancel](#) [Reset Password](#)

An affiliation can be created for accounts that are either not currently associated with an institution, such as an account solely with the Internet Assisted Reviewer (IAR) authority role, or for accounts

that need to be associated with multiple institutions. Users with the AA or SO role may create an affiliation for their organization only.

---

### NOTES:

- Administrative and reporting roles such as SO, AA, AO, FSR, etc., cannot be combined with Scientific roles such as PI, TRAINEE, ASST, etc.
  - Only accounts with scientific roles such as IAR, PI, TRAINEE, POSTDOC, etc., may have multiple affiliations. If an account has any roles in addition to these, additional affiliations cannot be added.
  - Fields grayed out cannot be edited.
- 

### Perform one or more of the following steps:

1. Edit the **Email** addresses, if necessary.
2. To add or delete roles click the + **Add Roles** button.
  - a. For more information, see [Add/Delete Roles](#).
3. To affiliate an account with an organization, click the **Affiliate** button, if displayed.
  - a. For more information, see [Affiliate Account](#).
4. If the **Unaffiliate** button is present, you can click it to unaffiliate an account.
  - a. For more information, please refer to the [Unaffiliate Account](#).
5. If the account has been deactivated, a **Reactivate** button will be present at the bottom of the screen. Click it to reactivate the account. For more information, see [Reactivate Account](#).
6. When you are done, click **Save** to save the changes or click **Cancel** to discard your changes.

When the **Save** button is clicked, the system displays the .

AMS  
Manage Accounts

Account Details ⓘ [Go Back](#)

**SUCCESS**  
Account was updated successfully!

User Information

User Type Commons

User ID DORIGHTDUDLEY

Primary Organization University of California Los Angeles

Contact Information

Name Doright, Dudley

Email eRATest@mail.nih.gov

Roles ⓘ

Showing 1 - 1 of total 1

Role(s)	Organization(s)
AA	University of California Los Angeles

[Manage](#) [Back to Search](#)

7. Perform one of the following options:

- To return to the *Search Accounts* screen displaying the previous search results, click the **Go Back** hyperlink.
- To edit the account's information, click the **Manage** button.
- To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

### 6.3.1 Account Statuses

AMS user accounts can have the following statuses:

- **Active** — A valid account in good standing.
- **Deactivated** — Account has been disabled by an administrator
- **Locked due to inactivity** — Locked by the system due to inactivity (no user activity for 120 days)
- **Pending Affiliation** — An individual account that has not been linked to an organization
- **Profile Only** — A user ID that is not associated to an account

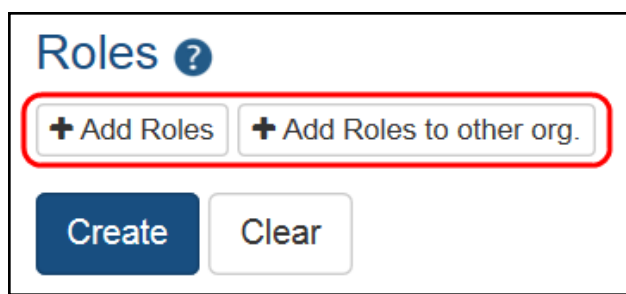
### 6.3.2 Add/Delete User Roles

---

#### NOTES:

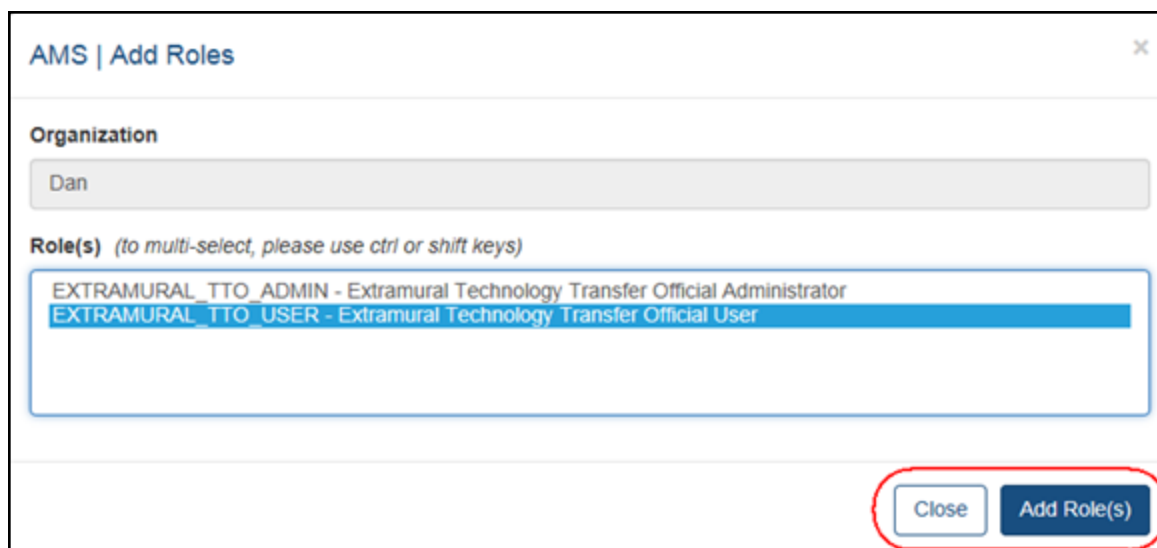
- The list of roles displayed is dependent on the logged in user's role.
  - Accounts with scientific roles should be maintained for the career of the scientist and affiliations should be added as necessary.
  - Administrative roles cannot be combined with scientific roles on the same user account and accounts with administrative roles cannot be affiliated with more than one institution.
- 

1. To add user roles to an account, click on the + **Add Roles** button at the bottom of the *Create Accounts* or *Manage Accounts* screen, as shown here.



The screenshot shows a section titled "Roles ?" with two buttons: "+ Add Roles" and "+ Add Roles to other org.". Below these buttons are two more buttons: "Create" and "Clear". The "+ Add Roles" button is highlighted with a red rectangle.

When the + **Add Roles** button is clicked on the *Create Account* or *Modify Account* screen, the pop-up *Add Roles* screen displays.



The screenshot shows the "AMS | Add Roles" pop-up screen. It has a title bar with a close button (X). Below the title bar is a section labeled "Organization" with a dropdown menu showing "Dan". Below that is a section labeled "Role(s) (to multi-select, please use ctrl or shift keys)" with a list of roles: "EXTRAMURAL\_TTO\_ADMIN - Extramural Technology Transfer Official Administrator" and "EXTRAMURAL\_TTO\_USER - Extramural Technology Transfer Official User". The "EXTRAMURAL\_TTO\_USER" role is highlighted. At the bottom right, there are two buttons: "Close" and "Add Role(s)". The "Add Role(s)" button is highlighted with a red rectangle.

1. Select the appropriate role.
2. Click the **Add Roles(s)** button.

When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).



3. To add additional roles, click the + **Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

### 6.3.3 Affiliate Account

---

#### NOTES:

---

- Only accounts with *scientific* roles such as PI, SPONSOR, POSTDOC, ASST, etc., are permitted to be affiliated with more than one institution.
- Accounts with *administrative* roles can belong to one institution only.
- Further, if a user leaves (unaffiliates) an administrative role at one institution, that account cannot be affiliated to a different institution in any administrative **or** scientific role: The user needs to create a new account to use with the new institution.
- Additionally, you cannot remove administrative roles from an existing account in order to add a scientific role instead: Once a user has held administrative role, he or she must create a new user account to use in another role.

- 
1. To affiliate an existing account with an organization, search for the user in AMS and select the **Manage** button in the action column of the search results.
  2. Click the **Affiliate** button under *Roles* on the Manage Account screen, as shown here:

**Manage Account** [Go Back](#)

**Note:** Any changes to the account are not saved until you hit the save button.  
- For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

**User Information**

User Type  
Commons

User ID  
XAVIERKNIGHT

Primary Organization  
Children

**Contact Information**

Last Name  
Knight

First Name  
XAVIER

Middle Name

Email  
eRATest@mail.nih.gov

Confirm Email  
eRATest@mail.nih.gov

**Roles** [?](#)

[+ Affiliates](#)

Role(s)	Organization(s)	Action
PI	Children's Hospital Corporation	
POSTDOC	Children's Hospital Corporation	

Showing 1 - 2 of total 2

[Save](#) [Cancel](#)

When the **Affiliate** button is clicked, the Add Roles screen opens, as shown here:

**NOTE:** The list of roles is dependent on the logged in user's role.

**AMS | Add Roles**

**Organization**  
University of California Los Angeles

**Role(s)** (to multi-select, please use ctrl or shift keys)

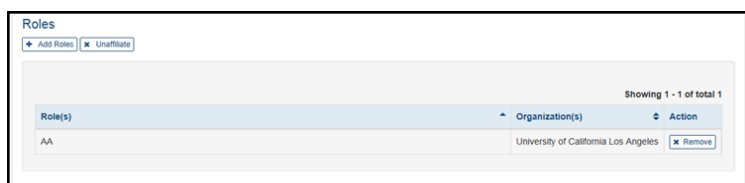
- AA - Accounts Administrator
- AO - Administrative Official
- ASST - PI Assistant
- BO - Business Official
- FCOI - External FCOI Officer
- FCOI\_ASST - Financial Conflict of Interest (FCOI) External Assistant role
- FCOI\_VIEW - Financial Conflict of Interest (FCOI) External View role
- FSR - Financial Reporting users
- GRADUATE\_STUDENT - Graduate Student
- PACR - Public Access Compliance Role

[Close](#) [Add Role\(s\)](#)

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.



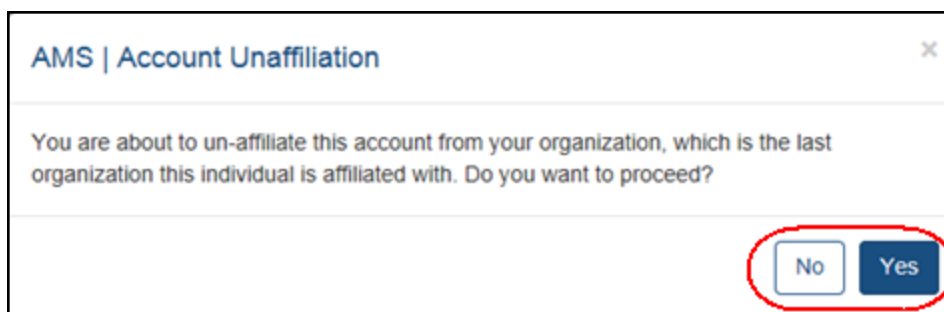
When the **Add Role(s)** button is clicked, the role is added, the account is placed in 'Active' status, and the **Unaffiliate** button appears in the *Roles* section, as shown here:



### 6.3.4 Unaffiliate Account

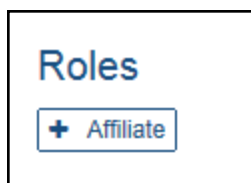
1. To unaffiliate an account, click the **Unaffiliate** button in the *Roles* section of the *Manage Account* screen.

When the **Unaffiliate** button is clicked, an *Account Unaffiliation* pop-up screen displays.



2. Click the **Yes** button to unaffiliate the account, or click **No** to cancel the unaffiliation.

When the **Yes** button is clicked, all roles assigned to the account are removed, the account is placed in 'Pending Affiliation' status, and the **Affiliate** button appears in the *Roles* section of the *Manage Account* screen, as shown here:



### IC Transfer Process

1. The Account Coordinator will un-affiliate the account by removing all roles for their IC.
2. The account will go into 'Pending Affiliation' Status, in which there are no roles associated with the account, and the user cannot perform any functions.
3. An Account Coordinator from the new IC will search for accounts in 'Pending Affiliation' status and select an account to affiliate.

For information on Affiliating an account, see [Affiliate Account](#).

### 6.4 Manage System Accounts

System accounts are used to access eRA [Web Services](#).

Agency, Commons and external iEdison users can manage system accounts in their organizations.

For information on obtaining and registering a certificate from a Certificate Provider or Authority, please refer to the [Web Services Certificate \(S2S\) Guide](#):

- Section 2.4.2 for iEdison users

Perform the following steps:

1. To manage a system account, first perform a search to locate the account.
  - a. See [Search for System Accounts](#) for more information.
2. On the Search Results screen, click the **Manage** button for the system account you want to manage.

When the **Manage** button is clicked, the *Manage Account* screen opens, as shown below.

Primary Organization
SM - Center for Mental Health Services
Go Back

Note: Any changes to the account are not saved until you hit the save button.  
- For example, if you affiliate someone, he/she is not actually affiliated until you hit the save button.

All fields are required unless they're marked (Optional)

### User Information

User Type  
System

Primary Organization  
SM - Center for Mental Health Services

### Certificate Information

Certificate Owner ⓘ  
NQJ4LQL2Z6I9T6NCPH8B

Certificate Provider/Authority CN ⓘ  
RAPIDSSL CA

Certificate Serial Number  
NQJ4LQL2Z6I9T6NCPH8B

### Contact Information

Last Name  
Voldemort

First Name  
Chiblen

Middle Name  
Test

Email  
Voldy@HaveNoNose.edu

Confirm Email  
Voldy@HaveNoNose.edu

### Roles ⓘ

+ Add Roles + Add Roles to other org.

Showing 1 - 1 of total 1

Role(s)	Organization(s)	Action
DOCSERVICE_GET_EADDITION_SERV	AA - National Institute on Alcohol Abuse and Alcoholism	Remove

Save Cancel Deactivate

**NOTE:** Fields that are grayed out cannot be edited.

- Edit the non-gray fields as needed.
- Click the **Add Roles** button to add the roles to the account. See [Add System Roles](#) for more information.
- To remove a role, click the **Remove** button. To remove all roles, click the **Remove All** button.
- Click **Deactivate** to deactivate an account. See [Deactivate Account](#) for more information.
- Click **Save** to save the changes or lick **Cancel** to cancel.

When you click **Save**, the *Account Details* screen opens and displays a success message, as shown below

AMS  
Manage Accounts Change Password

Account Details [Go Back](#)

**SUCCESS**  
Account was updated successfully!

**Note:** Validate Certificate button will validate  
1. If certificate authority is supported by NIH.  
2. If the uploaded certificate details match the certificate details entered.

**User Information**  
User Type: System  
User ID: SYS\_SMARTG\_439  
Primary Organization: University of California Los Angeles

**Certificate Information**  
Certificate Owner: NCI  
Certificate Provider/Authority: Go Daddy Certificate Authority  
Certificate Serial Number: PB:12:34:56:78:90 [Validate Certificate](#)

**Contact Information**  
Name: Smart, Get  
Email: eraDev@mail.nih.gov

**Roles**

Showing 1 - 1 of total 1

Role(s)	Organization(s)
APPLICANT_RETRIEVAL_DATA_SERV	University of California Los Angeles

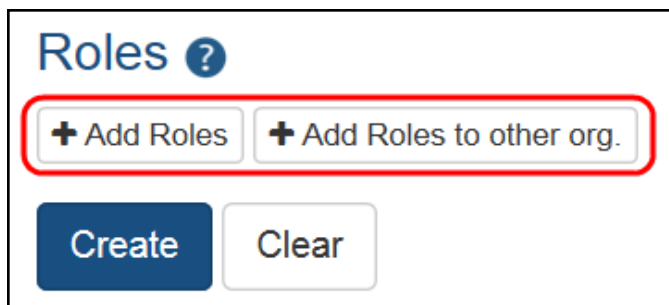
[Manage](#) [Back to Search](#)

8. You can perform these additional actions in the *Account Details* screen:
- If the certificate needs to be validated, click the **Validate Certificate** button. See [Validate Certificate](#) for more information.
  - To return to the *Manage Accounts* screen, click the **Manage** button or the **Go Back** hyperlink.
  - To return to the *Search Accounts* screen to enter new search criteria, click the **Back to Search** button.

## 6.4.1 Add System Roles

**NOTE:** The list of roles is dependent on the logged-in user's role.

1. To add system roles to the account, click on the + **Add Roles** button on the *Create Accounts* screen.



The screenshot shows a 'Roles' management interface. At the top, the word 'Roles' is followed by a question mark icon. Below this, there are two buttons: '+ Add Roles' and '+ Add Roles to other org.'. These two buttons are enclosed in a red rectangular box. Below the buttons are two more buttons: 'Create' (in a dark blue box) and 'Clear' (in a light gray box).

When the + **Add Roles** button is clicked, the pop-up *Add Roles* screen displays.

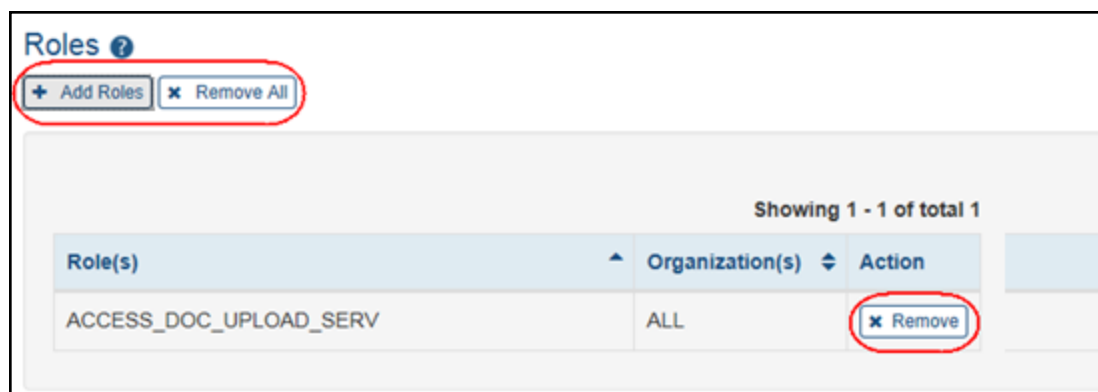
### External System Roles



The screenshot shows a pop-up window titled 'AMS | Add Roles' with a close button (X) in the top right corner. The window has a light gray header bar. Below the header, there is a section labeled 'Organization' with a text input field containing 'University of California Los Angeles'. Below this, there is a section labeled 'Role(s) (to multi-select, please use ctrl or shift keys)'. This section contains a list of roles, each with a blue highlight bar: 'APPLICANT\_RETRIEVAL\_DATA\_SERV - Submission Agency Data Service client', 'IEDISON\_FILE\_TRANSFER\_SERV - IEdison Officer Services eRA client', 'SERVICE\_PROVIDER\_ROLE - A service provider who can invoke S2S services offered by eRA', and 'SVS\_APPLICANT\_DATA\_SERV - Submission Validation Service clients - Applicants/institutions'. At the bottom right of the window, there are two buttons: 'Close' (in a light gray box) and 'Add Role(s)' (in a dark blue box).

1. Highlight the appropriate role(s).
2. Click the **Add Role(s)** button.

When the **Add Roles(s)** button is clicked, the system returns to the *Create Account* or *Manage Account* screen and displays the newly added role(s).

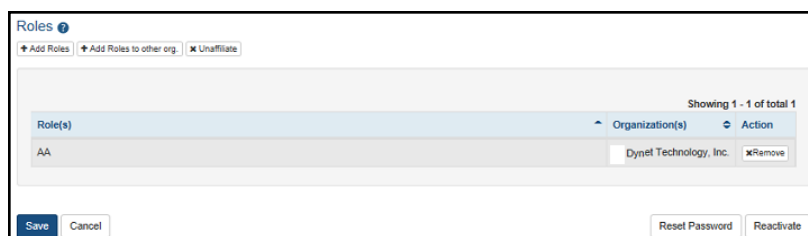


3. To add additional roles, click the + **Add Roles(s)** button. Repeat the steps above.
4. To remove a role click the appropriate **Remove** button in the **Action** column.
5. To remove all roles click the **Remove All** button.

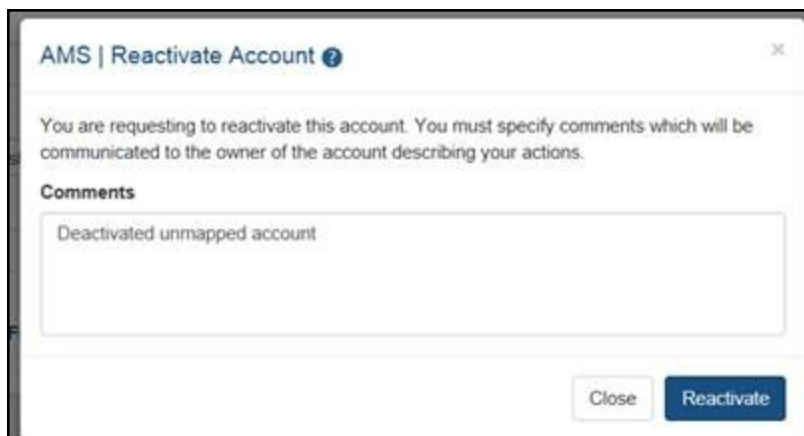
## 6.5 Reactivate Account

Follow these steps to reactivate an account that has been deactivated by an administrator.

1. Open the account in the *Manage Account* screen.
2. If an account is deactivated, a **Reactivate** button will be present at the bottom of the *Manage Account* screen, as shown here. Click this button to proceed.



3. When you click **Reactivate**, the *Reactivate Account* screen opens, as shown here.



The screenshot shows a dialog box titled "AMS | Reactivate Account" with a close button in the top right corner. The main text reads: "You are requesting to reactivate this account. You must specify comments which will be communicated to the owner of the account describing your actions." Below this is a section labeled "Comments" with a text input field containing the placeholder text "Deactivated unmapped account". At the bottom right, there are two buttons: "Close" and "Reactivate".

4. In screen, take these steps:
  - a. *Mandatory*: Enter comments in the comments field to inform the user about this action.
  - b. Click **Reactivate** to reactivate the account, or click **Close** to cancel.
5. When you click **Reactivate**, the system reactivates the account and displays a confirmation message.

And the account owner receives an email notification that includes the text you entered in the **Comments** field.

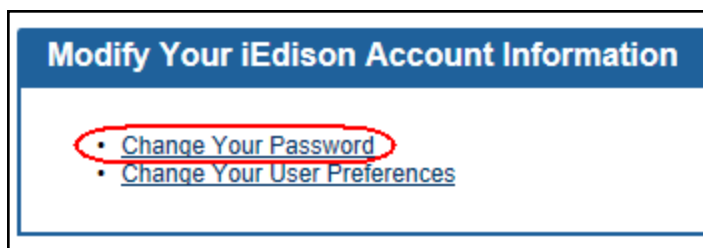
---

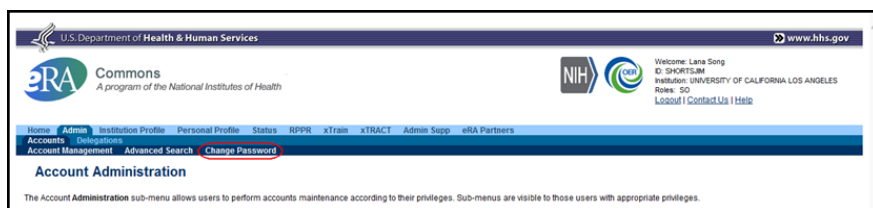
**NOTE:** The unlock notification asks the user to login to the account that same day. If the user does not login before the end of the day, the account is locked again.

---

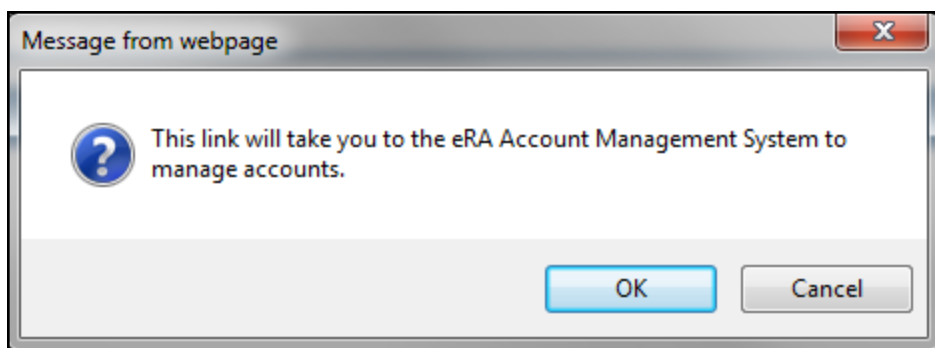
## 6.6 Change Password

1. Perform one of the following options:
  - a. For external iEdison users, click the **Change Your Password** hyperlink on the *Main Menu* screen.
  - b. For Commons users, click the **Change Password** tab.





For iEdison users, when the **Change Your Password** hyperlink is clicked, a pop-up screen displays.



When the **OK** button is clicked on the pop-up screen or the **Change Password** tab is clicked, the *Change Password* screen displays in a separate browser window.

The screenshot shows the 'Change Password' screen in the AMS. The page title is 'AMS' and the sub-header is 'Manage Accounts'. The main heading is 'Change Password'. Below this is an 'INFORMATION!' section with a list of password requirements: 'At least eight (8) non-blank characters in length', 'Must Contain a mixture of letters, numbers and Special characters: ` ~ ! @ # \$ % ^ ( ) - \_ = + [ ] { } | \ ' : ; " < > , . ? /', 'First and last characters cannot be numbers', 'Cannot contain username', and 'Cannot be reused within one (1) year'. There are three input fields: 'Current Password:', 'New Password:', and 'Confirm New Password:'. At the bottom, there are 'Save' and 'Clear' buttons, which are circled in red.



2. Enter your **Current Password**.
3. Enter a **New Password**.
4. Type your new password a second time in the **Confirm New Password** field.
5. Perform one of the following options:
  - a. Click the **Save** button to save the changes.
  - b. Click the **Clear** button to clear the fields.


Use your new password the next time that you log into Commons or iEdison.

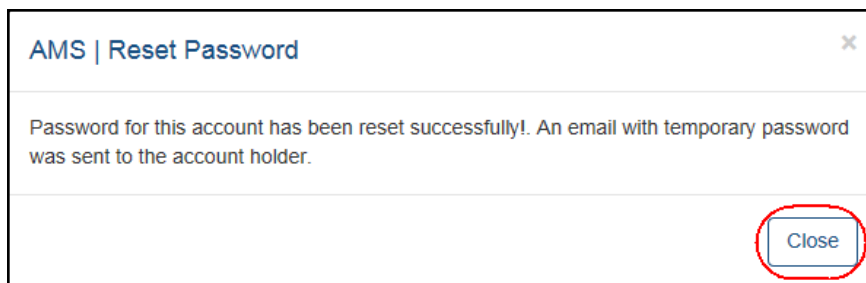
## 6.7 Reset Password

---

**NOTE:** Users are required to reset their passwords after a defined time period. The system locks the account is if the user fails to reset the password. Use this procedure to unlock these accounts.

---

1. To reset a user's account password, open account in the the [Manage Accounts](#) screen and click the **Reset Password** button  located on the lower right side of the screen.
2. A pop-up confirmation screen opens. Click **Close** to close it.



3. When you complete the password reset, an email notification with a temporary password is sent to the account holder.

## 7 User Reports

AMS includes the following reports capabilities:

- **All Users Report** — Information on all user accounts in your organization
- **Inactive Users Report** — lists user accounts that have been locked due to inactivity (**note:** for internal users only)
- **Deactivated Users Report** — lists user accounts that have been deactivated by an administrator (**note:** for internal users only)
- **Role Description Report** — lists all roles, role descriptions, and associated privileges for any business area (**note:** for internal users only)

To open the reporting functions, click the **AMS User Reports** tab.

The *All Users Report* screen opens. There are two versions of this screen, as shown below. The version you see depends on the organization you belong to.

### 7.1 All Users Report Screen for External Users

*All Users Report* screen for Commons, external iEdison, and State Department users

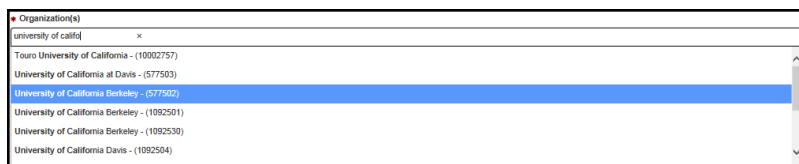
Use this screen to run an All Users Report on external users.

The **All Users Report** button is selected by default, as shown below. Follow the steps below to launch the report.



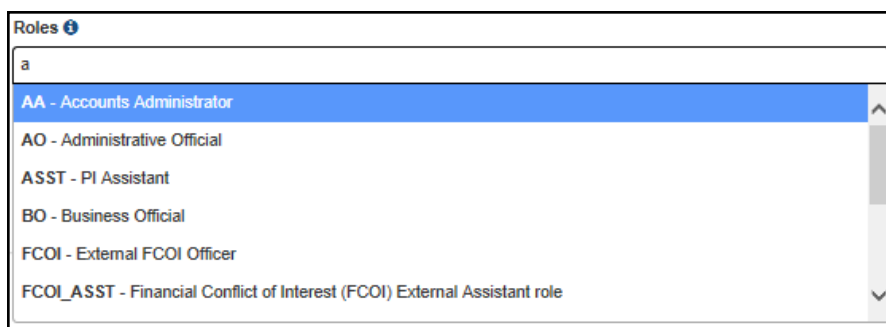
1. Select "Commons" in the **User Type** field and set the search criteria in the other fields as follows:

2. **Organization** — This field displays your organization name. Service Desk agents, to select an organization, begin typing its name or ID number in this field. The live search function displays organization names as you type. When the one you want appears, scroll down and click to select it, as shown below. (**note:** To select multiple organizations, hold the <Ctrl> key as you click.) **Note:** This field is mandatory.



A screenshot of a web application's 'Organization(s)' dropdown menu. The search bar at the top contains the text 'university of calif'. Below the search bar, a list of organizations is displayed, including 'Touro University of California - (10002757)', 'University of California at Davis - (577503)', 'University of California Berkeley - (577502)', 'University of California Berkeley - (1092501)', 'University of California Berkeley - (1092530)', and 'University of California Davis - (1092504)'. The 'University of California Berkeley - (577502)' option is highlighted in blue.

3. **Roles** — Leave this field blank to report all user roles. To limit the report to one or more user roles, click this field to open the drop-down menu or begin typing the name of a role. The live search function displays roles as you type. When the one you want appears, scroll down and click to select it, as shown below. (**Note:** To select multiple roles, hold the <Ctrl> key as you click.)



A screenshot of a web application's 'Roles' dropdown menu. The search bar at the top contains the text 'a'. Below the search bar, a list of roles is displayed, including 'AA - Accounts Administrator', 'AO - Administrative Official', 'ASST - PI Assistant', 'BO - Business Official', 'FCOI - External FCOI Officer', and 'FCOI\_ASST - Financial Conflict of Interest (FCOI) External Assistant role'. The 'AA - Accounts Administrator' option is highlighted in blue.

4. **Account Creation Start Date/End Date** — Leave these fields blank to report all time periods. To limit the report to a certain time period, enter a start date, end date, or start and end dates. Enter dates in MM/DD/YYYY format or click the calendar icon to select them from the calendar.
5. When you finish entering search criteria, click **Search** to run the report. See [Report Output](#) below.

## ***7.2 Role Description Report***

## 7 Report Output

### 7.3 All Users Report output

To run the All Users report, click the **All Users report** button and enter search criteria [as described above](#). When you click the **Search** button for the All Users report, the report output displays.

User ID	Alias User ID	Name	Account Creation Date	Last Login Date	Roles & Affiliations
SAW13376	SAW03337	Dawson, Jeremy	2011-07-20		TRAINEE - University of California Berkeley
BELE2442	BELE1546	Bellevin, Nick	2013-01-25		ASST - University of California Berkeley
ORT0197	ORT0007	Ortiz, David	2013-05-02		TRAINEE - University of California Berkeley
SAW0907	SAW0907	Barrett, Michael	2014-09-02	2015-06-30	TRAINEE - University of California Berkeley
VELL4482	VELL4482	Viller, Kevin	2015-06-01		UNDERGRADUATE - University of California Berkeley
VAN05527	VAN05527	Vander, Jason	2014-10-10	2015-12-08	POSTDOC - University of California Berkeley
WUE12047	WUE12047	Wueller, Bill	2015-04-09	2015-12-08	PI - University of California Berkeley
WU04482	WU04482	Wynn, Tim	2015-06-01	2015-06-01	GRADUATE_STUDENT - University of California Berkeley
CARE2458	CARE2458	Carroll, Orlando	2014-09-27	2015-06-30	POSTDOC - University of California Berkeley

### 7.4 Role Description Report output

### 7.5 Navigating the report output

These tips for browsing, filtering and exporting the report output apply to all report types.

The report output displays include the controls shown here.

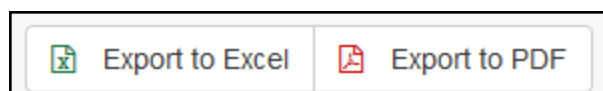
User ID	Alias User ID	Name	Account Creation Date	Last Login Date	Roles & Affiliations
---------	---------------	------	-----------------------	-----------------	----------------------

- To filter the report, type some text in the **Filter** field, such as a name. Only rows that contain the filter term will be displayed, and all instances of the filter text will be highlighted in yellow, as shown below:

Filter:

Account Creation Date ▲	Last Login Date ▲▼	Roles & Affiliations
2011-07-20		TRAINEE - University of California
2013-05-02		TRAINEE - University of California
2014-09-02	2015-06-30	TRAINEE - University of California

- To adjust the number of records displayed, select a number in the **Show per page** drop-down menu.
- To navigate the report pages, click a **Page Number** or use the left and right arrow buttons.
- To re-sort the report columns in ascending or descending order, click the up/down arrows in the column headers.
- To export the report output as an Excel spreadsheet or PDF, click the appropriate **Export** button, shown here:



- **Export to Excel**

When you click this button, an open-or-save dialog opens, as shown here.



Click **Open** to open the report data in Excel. A new Excel window opens. Go to it and click the **Enable Editing** button in the yellow bar at the top of the worksheet, then work with the spreadsheet as usual.

- **Export to PDF**

Click this button to save the report as a PDF file. A save dialog opens. Choose a location and save the file.